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ABSTRACT

Forty employer organizations granted interviews to discuss the status of their spouse employment assistance programs, motivation for the programs, and implementation experiences. Representatives of 21 relocation consulting and research organizations supplied information on the rationale for the services they offer, ways employers use their services, and issues and trends they observe in corporate assistance for families. Findings indicated spouse employment assistance programs were becoming more prevalent and formalized. Many companies were in a decision-making phase. For companies that reported the greatest satisfaction with their program, key issues were internal needs assessment, communication of the program, and positioning the program alongside other work force issues. Three types of assistance formed the basis of current employer programs: information on techniques for self-marketing, access to the local job market, and personalized counseling and support. Each option had advantages, but little data existed on whether spouse assistance was effective in reducing reluctance to relocate. New kinds of programs were emerging to address the problems of multiple operating sites, diverse spouse needs, and cost containment: decision-making packages, flexible programs with multiple options, commuter allowances, assistance for unmarried partners, and programs for international spouses whose visas prevent them from working. (YLB)

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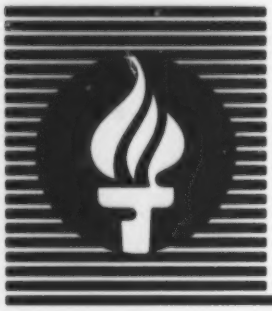

The Conference Board

Relocating Two-Earner Couples: What Companies Are Doing

Case studies of corporate spouse relocation assistance programs provide:

- *benchmarks for corporate policies*
- *assessment of program options*
- *guidelines for developing a policy*

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Relocating Two-Earner Couples: What Companies Are Doing

by Arlene A. Johnson

Highlights

When both husband and wife work, as is the case for 70 percent of American couples in the work force, it affects the decision-making, logistics, and finances of a relocation. To protect the viability of transfers, more than half of U.S. corporations are offering some type of re-employment assistance to spouses of transferred employees. Employers' experience with this new type of relocation assistance documents several key trends and policy issues:

- In most cases, spouse assistance is informal and ad hoc, but in a growing number of companies the process is formalized and expressed in terms of a business rationale.
- For companies that report the greatest satisfaction with their program, key issues have been internal needs assessment, communication of the program, and positioning the program alongside other work force issues.
- Three types of assistance form the basis of current employer programs: (1) information on techniques for self-marketing, (2) access to the local job market, and (3) personalized counseling and support. Each option has advantages, but there is as yet little data on whether spouse assistance is effective in reducing reluctance to relocate.
- New kinds of programs are emerging to address the problems of multiple operating sites, diverse spouse needs, and cost containment. Innovations include decision-making packages, flexible programs with multiple options, commuter allowances, assistance for unmarried partners, and programs for international spouses whose visas prevent them from working.

Many companies report launching or modifying their program within the last six months and others plan to start programs in the coming year, underscoring the fact that spouse assistance is a timely issue for companies that want to remain competitive in their relocation and work force policies.

Methodology

Research for this report was conducted by the staff of The Conference Board's Work and Family Center. The project is part of the Center's ongoing program to study corporate work and family initiatives and to develop information on options for implementing these programs in different work environments.

The content of nearly 100 personal interviews with representatives from more than 60 organizations provided the data for this report. Forty employer organizations granted interviews to discuss the status of their spouse employment assistance programs, motivation for the programs, and implementation experiences, both positive and negative. In the majority of participating companies, two or more in-depth interviews were conducted in order to provide a multidimensional view of how programs have developed. Interview participants included managers, administrators, and policy-makers. Participating organizations were selected to represent a variety of program options, as well as geographic and industry diversity.

In addition to the employer interviews, representatives of 21 relocation consulting and research organizations supplied information on the rationale for the services they offer, ways that employers use their services, and issues and trends they observe in corporate assistance for families.

Relocation surveys and articles in relocation and personnel journals provided a background for the analysis.

Introduction

Each year nearly 500,000 employees are transferred by their employers to new locations in the United States—to fill critical positions, to accommodate corporate reorganization, or as part of management development plans. To facilitate these moves, employers offer comprehensive relocation assistance programs that in 1989 cost, on average, $41,000 per relocation.[1] Alongside the traditional components of relocation assistance—such as payment for shipment of household goods, temporary living expenses, and costs of buying and selling a home—the 1980s saw corporations offering "spouse assistance" programs aimed at the increasing number of dual-earner couples who need to find a job for the relocated spouse.

Attention to spouse employment issues has increased gradually throughout the 1980s. In 1981, 4 percent or fewer of surveyed companies had policies for helping spouses find re-employment. By 1987, that number jumped to 10 to 15 percent, while over 50 percent reported that they sometimes provided assistance in a job search. In 1988, this was identified as one of the policy areas most likely to be under review for enhancement: a survey of 387 companies found that 15 percent of respondents had increased spouse services and another 27 percent planned increases in assistance for 1989.[2]

Corporate interest in programs for nonemployee partners is being fueled by three developments: the growing number of two-earner couples, increased employee reluctance to relocate, and heightened awareness of the link between family needs and a successful relocation.

Two-Earner Couples: Working Women

As a result of the dramatic increase in married women's labor market activity, the percentage of two-earner couples has increased from less than 48 percent of married couples in 1976 to almost 57 percent in 1987.[3] In the realm of social demographics, where significant social change is measured in decimal points, this is a change of remarkable magnitude. When only working families are considered, the preponderance of dual-income families becomes even more evident. In 1987, of all married couples with at least one spouse employed, two-earner families were 70 percent of the whole, and are projected to be as much as 80 percent of working couples by the year 2000.[4]

Not only are more married women working, they are earning and contributing more to the family's income[5] (see Charts 1 and 2). Since relocated employees are typically of a managerial rank, it is often assumed that a second income is less important for transferees than for the population as a whole. In fact, the opposite may be true. The highest work force participation rate of married women is among families with incomes of $50,000 to $75,000—the level of the typical two-income transferee family. In this income bracket, more than two-thirds of wives are earning salaries that have leveraged their families into affluence.

For many families, the wife's income can mean the difference between a comfortable life-style and just getting by. A relocation that gives a promotion and raise to the husband, but interrupts or reduces income for the wife, may prove a net financial loss for the family.

Two-Career Couples

Two-career couples present a special challenge for relocation. It is not possible to say exactly how many two-earner families are also two-career couples. To the extent that education and level of earnings define a "career" versus a "job," however, the number of two-career couples is growing. More than half of college undergraduates are women. They also earn half of all Master's degrees and continue to enter professions and management in increasing numbers.

The implications for corporate relocation are strong. A career spouse who relocates needs more than salary replacement—career continuity and growth are also important. The more

[1] See "Employee Relocation Cost Analysis, Tracking Trends to Gauge the Future," *Runzheimer Reports on Relocation*, December, 1989. Home sale and home purchase expenses are the largest part of relocation costs, as reflected in the fact that, while the average cost of relocating a home-owning employee was $41,000 in 1989, the average cost of a renter's relocation was $14,000.

[2] See "New Directions in Employee Relocation," *Runzheimer Reports on Relocation*, May, 1989, which summarizes policy trends based on a survey of relocation professionals. For a report on the emergence of spouse employment programs as a component of relocation assistance packages, see the Employee Relocation Council's "Executive Digest" of its 1987 Relocation Trends Survey.

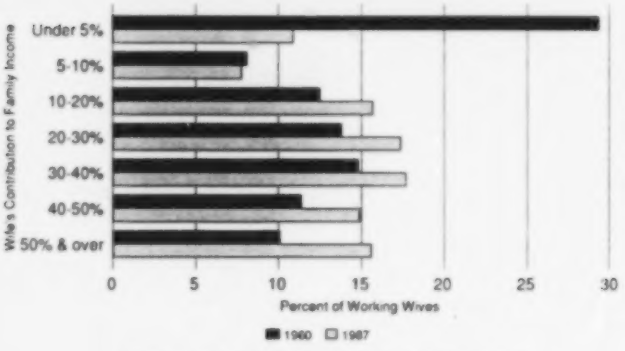
[3] See Susan Shank, "Women and the labor market: the link grows stronger," *Monthly Labor Review*, March, 1988, pp. 3-8. Previous differences between labor market participation rates of married and unmarried women have largely disappeared in the last decade.

[4] U.S. Department of Commerce, Bureau of the Census, 1989, *Earnings of Married-Couple Families: 1987*, Current Population Reports, Series P-60, No. 165. Projected work force participation rates for women are used as a proxy for projecting the prevalence of two-earner couples since the two rates have paralleled each other in the past.

[5] For a discussion and analysis of census figures, see Fabian Linden, "Working Women," *The Changing U.S. Market*, The Consumer Research Center, The Conference Board, Inc., 1988. See also "Earnings of Married-Couple Families," *Family Economics Review*, Vol. 2, No. 4, p. 27. The earnings of working wives—especially if they have a college degree—are actually growing faster than that of their husbands.

Chart 1

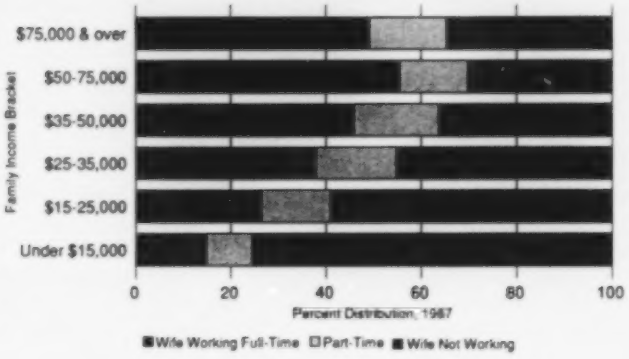
Working Wives are Contributing More...



Source: "The Changing U.S. Market," Consumer Research Center, The Conference Board, 1988.

Chart 2

...and Raising Family Income Levels



specialized or highly paid the spouse, the more difficult the job search.

Employers who help a relocated partner find suitable employment are not just accommodating the employee, they are protecting the financial viability of the transfer.

Relocation Reluctance

Concern about the employment opportunities for spouses is one of several factors contributing to increased employee reluctance to relocate. In separate surveys, the Employee Relocation Council (E-R-C), Atlas Van Lines, and Prudential Relocation Management (formerly Merrill Lynch Relocation Management), found that employees' reservations about relocating have increased in the last few years (see Chart 3).

According to relocation managers, concern for the spouse's employment and the children's welfare are frequently given as causes of hesitance to relocate (though family issues are cited less often than concerns about living standards and housing costs). Companies experiencing employee reluctance describe the problem as "minor," but say it's one of the most challenging issues the relocation industry faces in the next decade.[6]

According to the Prudential Relocation Management study, the family components of reluctance may be underestimated, since research has relied on the *perceptions* of relocation and personnel administrators. Employees often hesitate to raise family concerns for fear of seeming uncommitted to their job. Moreover, these administrators generally work only with employees who have accepted transfers. Transfers may be turned down at the line management level without the knowledge of the relocation office.

Getting a first-choice candidate to accept a transfer is likely to become more difficult and more important. During the 1990s, the labor force is expected to increase at a much slower rate than in the early 1980s.[7] Such a slowdown, combined with a critical skills shortage, will create intense competition for management and technical skills. Employers may increasingly rely on transfers in order to deal with regional shortages and derive optimum use of available talent.

Work, Family, and Productivity

Employers are becoming more aware of the interaction of family needs and corporate objectives.[8] It is generally ac-

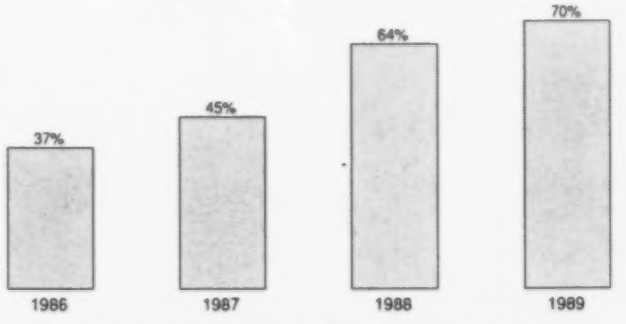
[6] Employee Relocation Council, "Executive Digest" of the 1988 Relocation Trends Survey; Atlas Van Lines, "Twenty-Second Annual Survey of Corporate Relocation Policies," 1989; and Prudential Relocation Management, "A study of employee reluctance to relocate," 1988.

[7] See William B. Johnston and Arnold H. Packer, *Workforce 2000, Work and Workers for the 21st Century*, Hudson Institute, Inc., 1987.

[8] For a discussion of the changing work force and its implications for family-supportive policies, see Audrey Freedman, *Human Resources Outlook 1990*, Research Bulletin No. 241, The Conference Board, Inc., 1989, and Kathryn Troy, *Rethinking Employment Security*, Research Bulletin No. 244, The Conference Board, Inc., 1990. For examples of corporate programs and the rationale behind them see also Helen Axel, *Corporations and Families: Changing Practices and Perspectives*, Report No. 868, The Conference Board, Inc., 1985, and Dana Friedman, *Family-Supportive Policies: The Corporate Decision-Making Process*, Report No. 897, The Conference Board, Inc., 1987.

Chart 3

Firms Reporting Employee Reluctance to Relocate



Source: Employee Relocation Council Relocation Trends Survey: 1986, 1987, 1988, 1989.

knowledged that, in addition to financial and professional concerns, family issues contribute significantly to the stress which is an inescapable part of any relocation. A transfer offer may stimulate worries about spouse employment, uprooting children, and the care of elderly parents, as well as getting reestablished in the new location. A family's adjustment is even more complicated if the wife, who traditionally managed logistics and homemaking, needs to divide her energies between settling in and job hunting.

One purpose of corporate relocation assistance programs is to moderate the stress and pressures of relocation, thereby keeping an employee productive and motivated. Traditionally, relocation assistance focused on the logistical and financial aspects of relocation, emphasizing reimbursement and physical relocation assistance. Today, the emotional, psychological, and family aspects of relocation are also receiving significant attention.

Weighing Costs, Benefits, and Options

Recognizing the value of family supports in relocation policy can, however, create a conflict for the employer who also wants to contain rising relocation costs. To explore the costs of addressing family issues versus the cost of not addressing them, the Employee Relocation Council commissioned a study by futurist Marvin Cetron. The study examines the implications of the changing family for relocation policy and concludes:

> "The power of working women is just beginning to be felt. As women take on positions of authority, they will be less likely to move for the sake of their husband's careers. And as women enter fields traditionally dominated by men, companies will be under increasing pressure to change their policies toward spouses."[*]

Many companies sense that they should be addressing the issue of spouse employment, but few, including those that already have programs, are confident about what they should be doing. Corporate practices are in flux, with new programs and consulting services emerging monthly. The rationale for spouse employment assistance has gained momentum in the last several years, but many questions remain about how to design and implement an effective program. This report describes the experiences of companies that have implemented spouse assistance, discusses program options, identifies policy design issues, and highlights salient questions and trends in the evolution of relocation assistance.

Female Transferees—and Male "Trailing Spouses"

As employers recruit and promote more women into professional and senior positions, the increase in male accompanying partners is likely to spur demand for spouse employment assistance programs.

The percentage of female transferees increased steadily during the 1980s, from a negligible number early in the decade, to 8 to 10 percent in 1986 and an estimated 13 percent of relocated employees in 1988.[1] Despite this rapid increase, women remain underrepresented in the transferee population relative to their presence in M.B.A., professional, and managerial ranks.

The growth in the number of women transferred is certain to continue. Employers are still hesitant about their willingness and ability to balance family responsibilities with a transfer, but that hesitancy is counterbalanced by several factors: (1) women recognize the link between career development and relocation, especially in fields like sales and marketing; (2) employers recognize that to amortize their investment in the recruitment and training of women, they need to utilize their skills wherever it is needed, just as they do those of men; and (3) the increased earnings of women make it economically feasible for more couples to consider a relocation for the woman's career.

As the number of married women transferees grows over the next decade, so too will the number of accompanying male partners. Young men are more likely than previous generations to accept a "trailing spouse" role. A 1986 study of married professional couples conducted by Allied Van Lines, found that 70 percent of the male respondents would move if their wives were offered a transfer. (Men over 35 were less likely to say they would move than younger men.)

Most male spouses want to be employed in the new location, and they may face special problems that require assistance. Reemployment for men is complicated by the suspicion some employers have about a man who would subordinate his career to his wife's. Data suggest that when the relocated spouse is a man, he is more likely to need and use spouse employment assistance than a woman. Mobil Corporation, AEtna Life and Casualty, and some employer consortia that have tracked usage rates of their spouse assistance programs find that 20 percent or more of their programs' users are men, a high proportion relative to the number of male spouses. In addition, relocation counselors report that while transferred wives may not always use the assistance offered, most husbands will.

[1] Employee Relocation Council, 1988 Relocation Trends Survey.

[*] Marvin J. Cetron, Rebecca Lucken, Charles F. McFadden and Barbara J. Weir, *Impact of the Changing Family on Employee Relocation; Implications of Spouse Employment*, Employee Relocation Council, 1987.

Developing a Policy

Interviews with relocation managers and relocation service providers indicate that many companies are in a decision-making or policy development phase. Some companies without policies have considered formalizing assistance for spouses and are monitoring industry opinion and internal developments to determine when there may be a need for policy change. Others are planning to launch a formal program within the next year. A large Midwestern firm, for example, plans to replace an informal practice of offering occasional job leads with a national program that is "broad-based and encompassing" within the first six months of 1990. Consultants and service providers see a marked increase in the demand for spouse services. One spouse assistance program had 26 active corporate clients in January, 1989, and doubled that number between May and October of that year.

In the course of establishing or enhancing spouse assistance, an employer inevitably confronts the basic question of motivation for the program—the need for the program and the purpose it will serve, for the employer, the transferee, and the spouse. Related questions concern the positioning of assistance, the conditions of availability, the role of outside service providers, and finally, how the success of the program will be measured. Answers to these questions may be explicit and conscious, or tacit and made by default. Either way, the answers are the decision points that shape the way a program is designed and implemented.

What Do Spouses Need?

There is disagreement, confusion, and even skepticism about just what a transferred spouse really needs and will use. According to some, career and professional people know how to market themselves, but hourly workers and nonprofessionals, who are considered generally unfamiliar with the job search process, need help. Managers who hold this opinion favor programs that offer generic information that help with resumes and self-marketing. They also emphasize the value of job market indices and employment databases.

Others contend that careerists, more than anyone else, need the most assistance because they have a greater personal and financial stake in employment. Their career transition is more difficult because management and professional jobs are in specialized market niches, are more region- and industry-specific, and are available through channels from which a newcomer is excluded. Employers who reach this conclusion emphasize the importance of personalized support, job market research, networking opportunities, and sponsorship in the local job market.

A growing number of companies, and most career counselors, take a position that needs vary by individual. The ease or difficulty of a job search is determined, they say, not by salary level but by the fit between the individual and the local job market. These companies favor a program that can be individualized—with different kinds of services available—and that have a capability for intensive assistance in some cases.

Confusion about what spouses need has led some companies to do an internal needs assessment. Marriott Corporation (see box), Mobil Corporation, Square D Company, and Ameritech surveyed their employees directly. The U.S. Air Force conducted focus groups and interviews. AT&T, Ford Motor Company, and Allstate Insurance Company collected feedback from ongoing management and employee groups. These assessments did not lead to the same conclusions, suggesting that variations occur within different work forces and relocation situations. But all the assessments did confirm the reality of two-earner issues. Within the scope of this research, every company that undertook an internal assessment decided to implement some kind of formal policy or pilot program.

Is There A Demand?

Part of the confusion about spouse needs stems from low program utilization rates. It is not uncommon to hear disap-

Needs Assessment at Marriott Corporation

In the spring of 1989, Marriott Corporation surveyed its transferee families to determine their needs. Since top management had recently set objectives for addressing work and family issues throughout the corporation, the time was right to investigate specific initiatives. The company's goal was to find out whether spouse assistance was needed and, if so, what it would cost. The intent was also to learn what negative impact would result from no action.

Marriott's assessment, managed by the relocation department, consisted of extensive telephone interviews and a written survey. All transferees in the process of moving (Marriott relocates 3,000 employees annually), were asked to discuss their anticipated needs. To a random sample of employees who had relocated within the past year, a written survey was administered which listed various kinds of assistance programs and asked: "Of the following, which would you have preferred? If this were available, would you use it? If so, how often?" These questions prompted many to write in the margins what the relocation director called "passionate responses."

Marriott found that spouses want resources. They want to know where to go for job information and how to get it. "We concluded that the need is not as intense as a lot of consultants would like you to think it is, but the need is there...and it's not always vocalized," the director says.

pointment voiced by executives who advocated programs and expected a good response. A manager of a durable goods manufacturing company where 10 percent of spouses use the assistance program exemplifies this attitude: "It's a small number considering all the feedback we got from employees asking for the program," he says.

On the other hand, some companies report a strong response to the programs. Raychem Corporation and BP America reveal that approximately 25 percent of relocating couples use the service. At BP, a need for the service is determined in the employee's initial relocation interview at the originating city; no spouse who was offered the service has turned it down.

Communication

The diversity of usage reflects as much about how employment assistance is communicated and perceived as it does about the need for the program. Managers, consultants, and industry observers identify three subjective factors that influence demand for spouse employment assistance:

(1) Transferees may be hesitant to ask for assistance, just as employees are reluctant to call attention to other family issues like child care. Fears about mixing family and work and appearing uncommitted combine to inhibit employees from mentioning family problems, even when those problems have a direct impact on work performance.

(2) The staff responsible for program communication and referrals may have conscious or unconscious reservations about offering the program. If the relocation counselor does not understand or believe in its merits or if a cost saving can be achieved by restricting usage, the program may not be offered with an open hand.

(3) Transferees and other employees may not recognize the value of the benefit, although it is in the employer's interest to offer it. The experience of employee benefits experts is that even very attractive new benefits must be communicated extensively before they are understood or utilized. Unless an employee has relocated frequently or is knowledgeable about the job transition process, use of the service will depend on the employer's marketing efforts.

Communication influences how well the program is used. One human resources executive explains that he is reluctant to expand the current policy because the demand is low and services are not being used. In the same breath he observes that the services are not openly talked about. "They could definitely be communicated better," he says.

At Kodak, where 10 to 15 percent of relocated spouses use the program, a great deal of effort goes into communication. The program is described in a book sent to all transferees, profiled on an internal database available to all managers, has been featured in the house newsletter, and enjoys word-of-mouth recommendations from employees and managers who have used the program over the last three years. Even so, company officials report, communication remains a problem—largely because hundreds of people are involved in hiring, staffing, and relocation and, therefore, in communicating the program to employees. Kodak believes the program will not achieve optimal use until each of those people understands the rationale and value of assisting spouses with employment issues.

Usage Rates

Usage rates tend to grow as the program becomes known. Johnson & Johnson's relocation manager points out that all human resource programs require a process of building understanding and use. Like J&J's other work-family programs in elder care and child care, he says, relocation assistance to spouses and families is in the early stages of communication and acceptance. It must be "continually publicized and brought to people's attention ... communication is tough in a big corporation with spread-out locations. You have to get the word out to the hinterlands," he says. Recognizing the importance of consistent communication, J&J is contracting with an outside firm to explain the assistance options to employees and to help them make an appropriate selection from the options available.

What's In It for Employers?

Managers give many reasons for becoming involved in spouse assistance. Some companies, especially those with doubts about the merits of the program, suggest that they were pressured to provide assistance. They cite feedback from employee involvement teams, fear about the impact of national demographic trends, and hard-sell tactics by consultants as elements of that pressure. One relocation manager candidly states that "hoopla in the media" concerning two-career couples has been more important to date than any internal evaluation. Except in high-cost housing areas where two incomes often preclude mortgage qualification, the goal of helping the spouse get a job is not frequently mentioned. Perhaps the objective of spouse employment is taken for granted—or perhaps it is not seen as an end in itself but a means to achieving other employer objectives.

In companies that made a conscious decision to offer assistance, the motivation is stated in positive terms: (1) to promote a more successful relocation by reducing family stress, (2) to offer a competitive relocation package, and (3) to reduce employee reluctance to relocate. While motivations are not determinative of program nature, the reason for a company's involvement seems to affect the kind of program it implements.

Reducing Stress

The rationale for assisting spouses, say many companies, is the same as for offering any kind of relocation assistance: to ease the stress of relocating and thereby reduce the productivity loss that a difficult move entails, and to emphasize emotional support and a caring attitude. The director of an innovative spouse program sums up:

> "It reinforces to spouses that the company really does have a concern—that we do care. In the past you got a sort of ho hum response when you said those words to them. If we actually take steps to assist a trailing spouse, the points you make from that are just tremendous."

Staying Competitive

Spouse assistance is becoming a necessary ingredient of a competitive relocation policy. Benchmarking and competitive analysis have led some companies to adopt programs. Says an executive in one of America's *Fortune 500* corporations: "We need to add this to be competitive. We wouldn't add benefits if others in the industry didn't have them."

Other companies adopt spouse and family policies, not just to stay even, but to take a leadership position. "We're looking at what it takes to be a premier employer," reports one company justifying its policy enhancements. Marriott's relocation director describes the situation for employers as one of "raising the table stakes." She elaborates:

> "Any time that you have an issue like work and family close to the surface, your table stakes change. No longer are basic benefits enough. Everybody has those. When your table stakes start to change, companies have a bottom-line reason for looking at it, because they're competing against a limited labor pool. That's when you start to quantify the cost of not doing something versus the cost of doing it."

Reducing Resistance

The goal of overcoming relocation reluctance figures prominently in the comments of managers as well as in the marketing literature of consultants. One manager explains that his company decided to implement spouse assistance "because of the change in worker demographics and because we wanted to encourage employees to consider transfers." Even in companies where assistance is not a policy, it may be offered on occasion to counter an employee's resistance to a high priority transfer or to entice a particularly desirable recruit.

Yet, there is doubt whether spouse assistance does in fact enter into an employee's decision about accepting a transfer. The availability and nature of spouse assistance is usually communicated during the relocation counseling process—after an employee has already said yes to the relocation. Exceptions to this procedure are group moves, in which the decision-making time line is extended, and competitive recruiting, where spouse assistance may be used to sweeten an offer. If an assistance program is well-known throughout the company, a couple may indeed be influenced, but most programs are still too young to have attained widespread visibility.

Moreover, in some companies the culture surrounding relocation is such that the employee does not really have a decision to make. "In my opinion," says one manager, "spouse employment assistance has very little impact on whether someone accepts or rejects [an offer]. They're not really asked, they're told—they're expected to go." Under these conditions, spouse assistance can only make a necessary choice more palatable. It may also affect the success of the transfer and the employee's willingness to consider subsequent transfers.

Whose Issue Is This?

Should spouse re-employment be considered a relocation issue—or should it be part of a human resources strategy for a changing work force? Is spouse assistance a matter for the relocation director, the human resource planner, the college recruiter, the benefits manager, or the work and family coordinator? Some companies answer, "all of the above." Companies find that the relationship of spouse assistance to the bottom line becomes more evident when the issue is positioned as part of a human resources strategy for attracting and retaining a diverse work force. Proponents of spouse assistance find they can leverage support by linking their program proposals to other human resource strategic issues such as staffing, recruiting, and work-family policies.

Recruiters are sometimes the first to document two-earner issues because executive recruits are in a better position than transferees to negotiate the issue of spouse employment. And the cost of assisting a spouse, say recruiters, is small compared to the cost of losing a first-choice recruit after thousands of dollars have been invested in the recruiting process. Programs at Mead Corporation (an employer consortium) and BP America (individualized counseling) are two examples of well-established spouse programs that grew from the efforts of executive recruiters.

Kodak, Mead and NCR

Kodak's program was sponsored jointly by the personnel and relocation departments. Since the majority of relocated families at Kodak are still traditional families with a nonemployed spouse, the relocation department was not able to justify a program built solely around relocation needs. But when the personnel department reported that recruiters were experiencing job offer rejections from members of two-earner families, the two departments joined forces and got approval of a program on the basis of its benefit for both new hires and transferees.

As competition for scarce labor increases, spouse employment assistance is also a competitive advantage in college and M.B.A. recruiting, emphasizes the director of recruiting and staffing at Mead. "An explanation of our spouse employment assistance is one part of our presentation at M.B.A. recruiting sessions at the top schools," he says. "It gets great play. Students want to know how it works and how it can help their spouse or fiance." NCR Corporation, which prides itself on recruiting top students, also believes spouse assistance will help attract the best candidates.

Dow Chemical and Mobil

At Dow Chemical and Mobil Corporation assistance is administered through the relocation function but is positioned as part of a long-term strategy for management development. Mobil's commitment arose from an internal assessment of career development practices (see Mobil case study on page 25). Dow tracks two-career issues as an integral part of its human resource planning, administered through the Personnel Resources Department. From internal surveys the company knows that 65 percent of its worker population is part of a two-earner family. An on-line human resources system flags dual-career couples, and tracks the mobility status of em-

ployees. The purpose is not to screen out two-earner families from transfers, but to alert management to situations that must be considered for successful transfers. The company feels this kind of information is important for succession planning and management development.

Not coincidentally, companies that define spouse assistance as part of a larger work force strategy tend also to have a formal policy commitment to employment assistance. They are, however, the exception. In most companies the decision for or against these programs is still a relocation policy decision, separate from conscious alignment with other human resource policies.

Spouse Assistance and Work-Family Programs

Two kinds of family-supportive benefits usually originate in the relocation department—spouse assistance and school matching, a service that helps families identify school systems that fit their educational priorities. Other work-family programs—such as child care referrals, elder care information, flexible work policies, and family leave policies—usually are developed by another arm of the human resources function. Whether and how spouse assistance is linked to these other family-supportive programs is an important consideration for policy development and implementation.

In announcing new child care benefits and spouse employment assistance at Amoco, Chairman Richard M. Morrow, linked both programs to the needs of a changing work force. His letter to all Amoco employees, dated October 3, 1988, began:

> "Both the American family and the U.S. workforce have changed dramatically in recent years. Today, there are more working women, more dual-career couples, and more employees with child care concerns than at any time in the past. Amoco recognizes that as a result of these changes, both men and women employees are increasingly faced with conflicting demands in their work and family lives."

Marriott, Allstate, Johnson & Johnson, IBM, and US Sprint are other companies whose spouse employment policies have gained momentum from a companywide focus on work and family issues. At Allstate, family relocation needs were identified when the benefits department directed attention to making all programs more family-supportive. At Marriott, the relocation department had been considering a study of the needs of relocating families, and top management's support for work and family policy development provided the support for doing so. Johnson & Johnson's policy gained impetus when the relocation department's assessment confirmed a need identified by a companywide task force on work-family issues.

Family policies and relocation assistance can be mutually reinforcing if they are coordinated. For example, experience shows a strong connection between effectiveness of spouse employment assistance and the availability of child care. Spouses report that they cannot devote energy to a job search until they find adequate child care in the new location. Faced with this reality, one company's spouse employment consulting firm set about to arrange child care for its client spouses—only to discover that the company already offered a service for helping employees find child care. That service, though available to transferees, was not being used because it had not been communicated as a relocation service.

AEtna and Allstate make transferees aware of existing corporate programs, whether or not they are part of relocation policy, thereby increasing support for relocating families without increasing costs. Says a manager in Allstate's benefits department, "We have had child care resource and referral for two years, but we hadn't communicated it or integrated it into the relocation program. Now we just remind relocating parents that they may have a need to learn about day care in the new area." AEtna transferees are informed of the company's child care and elder care referral program. The availability of these services, AEtna believes, makes a significant difference, since the company estimates that 10 percent of its relocation refusals are related to these concerns.

Despite growing awareness of family relocation needs, it is still common to treat such assistance and corporate work-family benefits as distinct and separate. In the words of one manager: "Relocation is viewed as a strict business policy, very distinct from work-family benefits." This attitude may prevail even in a company that has extensive benefits in the areas of child care, elder care, and flexible work hours. A relocation administrator in one such company explains, "Elder care and child care—that really doesn't have anything to do with us here [in the relocation department]."

Create or Buy?

Since third party firms are the service providers for much of the logistical and home finding aspects of relocation assistance, many companies also elect to purchase spouse services outside. And often when companies are formulating a policy or see a growing demand, they tend to turn to an outside contractor. Those companies that perceive a low demand for employment assistance or work with spouses only occasionally, however, continue to prefer informal assistance offered through internal staff.

The advantages of using an outside consultant include a high quality service, advice of career development and job market experts, conservation of internal resources, and confidentiality for spouses. An experienced relocation director observes: "I wouldn't even contemplate doing it internally any more...Outside of the time issue, spouses feel much more at ease if they don't have to talk to their spouse's employer." Cost is also a consideration. One relocation manager, whose company is paying $1,500 for each spouse counseled, explains, "We could not provide this level of service within the relocation department without sustaining dramatic cost increases."

There are, however, some disadvantages in the growing dependence on counseling consultants. One is that companies may see the options available only in terms of the packages consultants are offering. Some acknowledge that their priorities are strongly influenced by consultants. There is a danger that the process of selecting a consultant's package substitutes for developing a policy. To avoid ending up with an off-the-shelf program, Mobil worked with its consultant to tailor the program to its needs, and IBM and US Sprint negotiated modifications of a basic program in order to meet their company objectives.

Another danger in purchasing services is that the company may relinquish quality control by relying on the consultant and not developing an internal understanding of the issues. When some companies describe their programs, this dependence on outside firms is very evident. One relocation manager describes her arms-length attitude: "I want as little involvement as possible. I have lots of things to do, and this makes it as little work for me as possible."

Other companies advise that, even with the best of consultants, they cannot abdicate responsibility and involvement if the program is to be successful. They insist there be a control point, "a contact person or a small group of people who are totally responsible" for the quality and results. This is necessary not only to monitor job placement results but also to communicate and market the program internally, to refine and improve the service, and to help link the program to other strategic issues.

Who Gets Assistance?

Originally, spouse re-employment assistance was, quite literally, just that. In order to qualify for assistance, a person had to be married to the transferred employee and employed full-time before the transfer. Today, many companies see bottom-line reasons for expanding the availability of assistance. While many policies still specify that the assisted person be a previously employed spouse, others are making assistance available to a transferee's fiance or "significant other" of either sex. A growing number of companies are writing their official policy in terms of "partner assistance" rather than "spouse assistance."

The rationale for this change is pragmatic. If the purpose of spouse assistance is to facilitate a successful relocation, then anyone whose employment affects the transfer—or whose unemployment hinders it—deserves assistance. This leads some programs to go even beyond "partners" in offering assistance. At US Sprint, the policy extends to any household member, including a parent or child, who has been employed full-time in the previous 12 months. Raychem's policy is to assist anyone who is a "partner" of the employee, but, says the firm's relocation manager, "We would consider job assistance for a child or other person if there was a need and it made good business sense to do so."

Kodak and Amoco are among a small number of companies who offer individualized career counseling to all spouses, whether or not they have a work history. Amoco requires only that the spouse want to work in the new location. Kodak goes even further, allowing spouses to use the counseling to identify local volunteer opportunities or evaluate continued education.

The time during which a spouse may request assistance also seems to be expanding, on the premise that the family may need to get settled before the spouse can pursue employment. A number of companies, including Kodak, BP America, and Ford keep the option open for one year following the move. Even when time eligibility is restrictive, it may be interpreted flexibly to meet the needs of the family. As one consultant observes, "Time lines are necessarily vague as to when the clock starts running. Is it when the move is accepted or when the boxes are unpacked and the kids are in school?"

Assistance for partners of college recruits, if available at all, is usually on a more limited basis. But this, too, is changing as companies see a possibility for improving their competitive position on campuses. As of January 1990, Amoco began offering spouses of college recruits the same counseling package that longtime employees' spouses receive.

Does the Program Work?

On the whole, more time is being spent on selecting programs than in evaluating them. In part this is because few work place programs are ever evaluated. Moreover, program administrators are uncertain about what to evaluate.

The success of a spouse in finding a job is one measure of success. Companies that use external consultants have the advantage of knowing, usually on a quarterly basis, the status of every job seeker and the duration of every job search. Employer consortia also track these figures. But many employers have neither baseline data nor post-assistance data to evaluate the impact of assistance.

Internal program evaluations are usually based on utilization rates and employee feedback. If a program is well understood, usage may indeed be a measure of effectiveness. But, as noted before, utilization rates alone suggest as much about needs and how the program is communicated as they do about program effectiveness.

Employee feedback is sometimes informal and unsolicited. It may also be more formally solicited by surveying transferees about all aspects of the relocation from moving van service to home-finding assistance. But since self reports and general feedback are always influenced by subjective factors, successful job seekers are more likely to be positive in their feedback, whether or not the assistance was responsible for their success.

While feedback can indicate whether the employee is generally satisfied with the program the company provided, it may not give information for a cost-benefit analysis of the program's effect on reducing relocation reluctance or enhancing productivity. Generally absent is information on the length of the job search and what impact the move had on the spouse's career, earnings, and job satisfaction.

Some companies, however, are monitoring program results in terms of specific objectives. NCR Corporation is evaluating spouse employment as a factor in recruiting and relocation decisions. US Sprint gathers data on the time required for post-move adjustment. US Sprint's data is used to estimate the impact of assistance on shortening adjustment time, and therefore improving post-transfer productivity. At Mobil, where managerial retention and development was a primary motive for introducing assistance, the company is evaluating whether spouse assistance enables managers and professionals to move.

For many companies, the basic rationale for spouse assistance appears to take the place of evaluation, so that assumptions may go unquestioned. Many companies report that their interactions with transferees, the expressions of appreciation they receive, and the examples of successful job searches provide the necessary evidence for the value of the program. Experience validates what they know intuitively—that in the short run, spouse assistance makes for more successful moves, and in the long run, helps to keep their work force mobile.

Program Options

Within the human resources and relocation community, there is widespread awareness of how dual earner issues may affect the acceptance and success of a corporate relocation. Great variation, however, exists in how employers act on that awareness.

Annual relocation practices surveys (see table on page 13) support three observations about the current status of spouse assistance programs:

- Though many companies have spouse assistance practices or "programs," few have written policies. Most employment assistance for spouses is still offered on a case-by-case basis, with as much as 75 percent of companies surveyed offering some type of assistance on some occasions.
- There is no consensus on what type of assistance is best. Unlike the mid-1980s, when a large increase in the number of companies offering assistance was reported, much of the change in spouse assistance today is in the nature of services being offered and suggests cautious experimentation.
- There is evidence of a trend toward relying less on internal corporate resources in favor of committing funds to using outside services to assist spouses. This may indicate increased long-term commitment to spouse assistance.

As a result of the policy development of the last few years and the increase in consulting services, many model programs now exist for employers to consider. (For a summary of options, see box on page 14.) The shape that a corporate assistance policy takes depends not only on the types of assistance offered, but the way in which that assistance is delivered, personnel and financial resources available, and corporate assessment of spouse needs. Though diverse in their implementation, all corporate programs offer one or more of three basic types of assistance:

- Information on job search skills and career transition
- Access to local job market
- Individual support and counseling

A fourth type of assistance, financial reimbursement, allows the spouse to purchase one or more of the above.

Printed Job Search Information

Brochures, policy statements, and informational handouts are an integral part of most corporate relocation packages. In addition, a transferee may receive an information packet to pass on to the relocating spouse. Providing printed job transition information is a low-cost way of acknowledging the spouse's job concerns and of alleviating the stress associated with a job search. Since a major source of stress is anxiety about the unknown, psychologists and counselors who study the relocation process point out that factual information, clearly presented, addresses that anxiety and helps families cope with the multiple tasks of relocation.

Job search information offered to spouses varies. Some companies provide an inexpensive, brief brochure with a checklist of "tips for a career move." Others commission or purchase detailed information, often in workbook format and sometimes accompanied by audio tapes, bibliography, and job-seekers' resource directory. Some employers distribute these materials to all relocating families, while others make it available on request or at the discretion of the relocation administrator.

The workbooks and manuals are usually step-by-step guides to managing a job search. They begin with self-assessment exercises (what are your major accomplishments and goals?), and take the user through planning a job campaign (how to research a job market and identify major employers) and marketing oneself (how to write an effective resume and interview successfully). The content is generic career guidance information that is packaged for transferees. The per-unit cost for the most comprehensive, self-administered career transition packages can reach $500.

In the early and mid-1980s, when the term "spouse employment assistance" was entering relocation parlance, including any type of spouse career information in the corporate relocation package was considered an innovative step. In its 1987 survey of relocation trends, E-R-C found that 15 percent of its respondents were providing spouses with printed materials (2 percent as a formal policy and 13 percent on a case-by-case basis). Administrators and consultants today suggest that the prevalence of this kind of assistance is increasing, but usually not as a stand-alone package. Companies that are investing in spouse job information materials often provide it as one of several options. Some examples:

- As part of the company's comprehensive programs to assist families, Johnson & Johnson distributes a package of in-depth information on job search techniques to relocating families. The material is available on request and is supplemented by personal counseling as needed. This approach replaces the informal and occasional assistance the company offered prior to 1989. It was selected because it could provide detailed, generally applicable information at a relatively low cost.
- U S West gives working partners a choice of either a self-guided workbook with audio tapes or up to $2,500 to apply to job search costs such as employment agency fees, interview trips, and job counseling. This program replaces in-house job counseling that the company offered prior to 1989. The printed information is intended to satisfy the needs of most spouses, but the reimbursement option is also available for especially difficult job transitions.

Prevalence of Spouse Employment Assistance Programs
A Summary of National Surveys*

	Employee Relocation Council, Annual Relocation Trends Survey		Prudential Relocation Management, Annual Study of Corporate Mobility Policies Among Major U.S. Corporations				Runzheimer International, Survey and Analysis of Employee Relocation Policies and Costs	
	Formal Policy	Case-by Case						
	1987 N = 489 %		1985 N = 606 %	1986 N = 606 %	1987 N = 613 %	1988 N = 614 %	1987 N = 618 %	1989 N = 586 %
Using Internal Resources								
— In-house assistance with resumes and job counseling (informal counseling sessions)	3	37	44	49	50	43	48	43
— Help find employment with other companies at the location	2	48	59	57	57	43	54	55
— Reimburse job search expense/pay for job-finding trip	—	—	11	18	15	17	12	11
— Place spouse within company	1	44	40	41	43	33	41	36
Using External Resources								
— Pay fees of outside search firm or employment agency	—	—	12	13	13	15	12	6
— Provide printed materials on job search	2	13	—	—	—	—	—	—
— Pay for formal job counseling	7	10	25	27	30	35	16	18
— Percent of firms reporting that they provide some assistance	10	62	—	—	27	32	30 case-by-case 30 5 formal policy 8	

* Totals may exceed 100 percent because of multiple answers. The findings are not strictly comparable because the surveys used different wording to describe program options, and not all options were included in each survey.

• Compaq Computer Corporation supplements the information package with a "Career Corner" at the company's relocation resource center. The company also participates in a consortium of Houston employers who cooperate in circulating spouse resumes. The program was implemented in March 1989 as the first formal policy to support relocating families. Unlike companies that provide information packages on an as needed basis, Compaq, with 500 relocations annually, provides the materials to all of its married transferees, even if it is not requested. This increases the impact of the assistance, says the firm's director of relocation. "It prevents any misunderstandings or doubts about who really needs it. Spouses who really need a lot of help and support use it the most."

Printed information is an attractive option for companies making the transition from informal assistance to a formal policy or wishing to offer substantive assistance while keeping costs down. As one relocation administrator explains, "We chose this route because we think the concerns of the trailing spouse are an issue, and we know we should do something about it. But the nature of the problem is not documented sufficiently to

Options For Spouse Employment Assistance

Type of Assistance	*Advantages*	*Disadvantages*
Printed Information on Job Search and Transition	— Portable, self-paced — Easy to administer and distribute — Communications company concern — Relatively low cost	— Quality of materials varies — Relies on individual motivation and discipline — Not targeted to individual needs, no follow-up
Employment Data Base	— Low cost beyond start-up — Easily accessible — Allows spouse to preview market	— High investment at start-up, needs ongoing update — No personal support or follow-up — Spotlights standard job categories, not special situations
Informal Networking	— No direct cost to employer — Conveys concern for employer and spouse	— Inequitable—in level and availability of service — Impractical for serving large number of spouses
Internal Placement	— No direct cost to employer — Reduces employer's cost of recruitment — Eliminates need for job search	— Can benefit only a small number of spouses, limited by range of internal job categories — May substitute for broader-based assistance
Employer Consortium	— Little or no direct cost — Increases visibility of spouses and spouse issues—members become informed advocates — Good placement results	— Labor intensive relative to placements — No support for spouse beyond original contact — Large volume from any one company overloads system
Individual Support and Counseling	— Targeted to personal needs, communicates concern for individual — Motivates and supports job search — High success rate, shortens job search [Using *internal* resources: Reduces direct costs Using *external* resources: Preserves confidentially]	— Higher unit cost — Requires extensive communication efforts [Using *internal* resources: Counseling expertise varies Using *external* resources: Externalizes knowledge of spouse issues]
Reimbursement for Job Search	— Spouse can select assistance needed — Company pays only for services used	— Impersonal—focuses on logistics, not emotions, of job search — No quality controls on purchased services

justify a big expenditure or a Cadillac program." Though the role of information in reducing stress and conveying corporate concern is well-documented, little data exist as yet about the effectiveness of job search information in helping the relocated spouse find a job.

Access to Job Market

An axiom of job-seekers and career counselors is that 80 percent of available jobs are unadvertised and are available only through word-of-mouth referrals, networking, and personal leads. Salary ranges for a particular city, local licensing requirements, location and travel times to major employers, regional demand for specific job categories, names of peers and professional organizations are examples of information that job-seekers need and relocated spouses often do not know how to get.

The value of this information is immediately apparent to both employers and relocating families. Not all spouses value or will use assessment and interview skills information, and some em-

ployers view job counseling as "soft" assistance. But everyone recognizes the relevance of job leads and employer information.

Employment Databases

The use of databases to sort and target information is increasing. While the idea of computerized job banks is not new, advances in computer networking and access to on-line terminals, as well as growing comfort with computer technology, suggest that national and even international databases will become a part of many spouse assistance programs.

In response to its needs assessment survey, Marriott plans to start building a national database in 1990 that will enable transferees to access job market information in the new location. Marriott plans to gather information from sources in the field using real estate brokers, chambers of commerce, and other local contacts, first in major cities and later adding smaller ones. Though the program envisioned is large, the cash outlay is expected to be less than other assistance options.

A database may provide a profile of a job market, or it may store actual job leads. As of early this year, AT&T began offering transferred spouses access to a hotline of job leads throughout the U.S. Though originally created to assist employees who were changing careers due to a result of downsizing and reorganization, its potential value for relocation was recognized by a committee investigating spouse employment options. Individuals accessing the database complete a personal job profile, which is then matched with the three most appropriate openings in the database.

A database may be one of several types of assistance that a company provides. Warner Lambert, for example, contracted with an outside firm in early 1990 to provide relocated partners with access to a database as well as counseling, networking, and guidance components.

Relocation consultants and government organizations are also using databases as part of their spouse assistance programs. A program in the U.S. Air Force centers around a modem-connected, international database that enables couples to preview job opportunities at several locations and then factor spouse employment opportunities into their choices. (See box on pages 16-17.) The Family Liaison Office of the U.S. Foreign Service, Department of State, went on-line in November, 1987, with the Centralized Data Bank of Family Member Skills, a service that allows the receiving location to preview the arriving spouse's skills, education, and prior work experience, and to initiate job search activities.

Informal Networking

Over the past few years, employers have typically provided job market information to relocated spouses by informally helping to identify possible job leads. Called "networking," this type of assistance is voluntary on the company's part and is done as a favor or accommodation. Even with the growth of formal assistance and consulting services, these informal referrals remain the most prevalent type of assistance; of 471 respondents to the 1987 E-R-C Relocation Trends survey, 48 percent reported that referrals are made on a case-by-case, informal basis.

Some companies have made a conscious decision not to adopt a formal policy, but to handle spouse employment needs by drawing upon the human resource manager's contacts. This approach requires from one hour to one day of the manager's time, depending on the job needs. Companies report, however, that they tend to give more time to spouses of senior executives or highly desirable recruits, and to spouses with unusual job requirements.

While informal referrals have the advantage of entailing no out-of-pocket costs or policy commitment, they have the disadvantage (from the recipient's perspective) of being limited by the extent of the local contact's network and time available—significant limitations in light of the growing number of employed spouses and the diversity of their employment interests. Equity is another potential issue with informal referrals. Not everyone who needs assistance will get any or equal service.

Internal Placement

One market to which an employer can easily provide access is its own. Many employers may be open to employing spouses, provided that couples do not have direct reporting relationships with each other. According to the E-R-C 1987 survey, internal placement is the second most prevalent form of informal assistance.

Du Pont and Dow Chemical have formalized the internal placement option and give a relocated spouse preferential consideration for available positions. Dow's guidelines for internal placement, dating from 1987, state: "Normal consideration will be given to non Dow-employed spouses for openings at the new location. They will be given preferences over other new hire applicants, provided they are qualified for the job opening." Dow reports that it has had excellent experience with this hiring practice. Of the company's approximately 1,200 relocations annually, 400 to 500 are dual-income moves. Of these, 50 to 80 spouses are placed internally.

Even a large corporate headquarters, however, cannot offer positions to meet all needs. For this reason, companies that have a commitment to spouse assistance may use internal hiring as the first option to explore, and supplement it with other types of assistance. Raychem Corporation always considers a transferred spouse for internal placement, but when that is not feasible, the company offers personalized counseling and networking assistance. IBM adds a personal counseling service to its internal placement option, and has increased the amount available to reimburse spouses for their job hunting expenses. Dow finds that many more spouses are serviced by the personal counseling and support services than by internal placement.

Consortia

The employer consortium is another approach for giving special access to the local job market. The objective is to give high visibility and direct access to the region's leading employers. These networks usually consist of 25 to 50 employers located

United States Air Force: A Global Database With Local Coordination

Readiness is to the U.S. Air Force what profits are to corporations—the reason for being. When the Air Force discovered that spouse issues were jeopardizing mission readiness, it set out to create employment assistance that could serve its 123 major installations around the world and, in the process, change some traditional attitudes.

In the late 1970s retention had become a serious problem. Expensively-trained, highly skilled personnel were leaving the service in increasing numbers. Studies showed that attrition was related to family issues. The findings demonstrated that employment is important to a spouse's satisfaction with military life, and spouse support for the service member's career is important in the decision to reenlist. Responding to these findings, a centralized Air Force Family Matters Office with a Family Support Center was established at every major installation to deliver family services, including spouse employment assistance.

When the spouse program was evaluated in 1984, the concept of a working spouse was found to be in direct conflict with the organization culture. The institutionalized role of the military wife was to support her husband's career through social and volunteer involvement in the life of the base. The strength of this tradition prevented spouse employment issues from being fully recognized and addressed. "Spouse employment is not an issue here," many commanders reported.

In August, 1987, the *Air Force Times* published an article recounting incidents of women who had been pressured to give up employment for the sake of their husbands' careers. Publicity surrounding this article prompted the Chief of Staff and Secretary of the Air Force to "affirm career plans and aspirations of spouses" and to appoint a blue ribbon panel to make recommendations on how to resolve the tension between traditional military expectations and the growing trend toward spouse employment. After talking with 2,600 officers and spouses on 17 bases in every major command, the panel recommended in March 1988 that the Air Force substantially enhance its spouse employment assistance program.

The resulting Spouse Employment Resource Program (SERP), was launched in May 1989, and combines a range of direct and indirect services in three types of programming: (1) supervised job search training, (2) active networking, and (3) an automated job bank. Spouse Employment Coordinators (SECs), whom each installation was directed to add to its Family Support Center staff, were charged with developing, delivering and marketing these services.

The job search training aspect of the program covers a full range of career planning topics in workshop settings. Explaining why the Air Force chose this approach rather than giving spouses one-on-one counseling or a job search manual, the chief of family policy and long-range planning observes: "There are only a few people who are successful in using self-motivated, self-taught materials. Since you're dealing with a population that moves every two to three years, it makes sense to teach the skills of the job transition process."

In the manual of program guidelines, SECs are instructed to give a substantial amount of their time to developing networking and referral systems (see diagram). This activity includes promoting the hiring of spouses in the civilian community, establishing links to local business and professional organizations, developing information on volunteer and

within a specific geographic region that agree to give prompt attention to spouse resumes. Each corporate member has a representative who identifies spouse employment needs and circulates resumes to other consortium members. Employer consortia are active in a number of locations including Columbus and Dayton, Ohio; Dallas and Houston, Tex.; Northern New Jersey, Washington, D.C., and Research Triangle Park, N.C. (see box on page 18).

Some consortia are informal, but most have designated leadership, regular meetings and defined referral procedures. In Dayton, Ohio, the I-75 RATS (so-called because the members provide Relocation Assistance To Spouses and are located along a 65-mile stretch of highway I-75) meet monthly to maintain the network and to exchange resumes. Additionally, members and guests (no headhunters are allowed) meet two times a year to hear speakers and to discuss personnel and staffing issues.

The Dallas Metroplex Spouse Employment Assistance Program (DM/SEAP), with 40 members in the Dallas area, conducts quarterly programs for its general membership. The seven-member administrative board meets for two hours each month to handle membership development, to monitor consortium activity, and to address any emerging problems, such as companies that are overloading the network or making inappropriate referrals.

Targeting spouse resumes is critical, says the management employment manager for J.C. Penney, Inc. and DM/SEAP board member: "We work to maintain the integrity of the system. Out of 40 members, an individual resume may go to just one or two companies. Our initial concern and continuing commitment is to avoid creating a paper mill." To help members make appropriate referrals, each member company develops a program directory profiling the types of positions for which the company recruits externally. The referring company compares the spouse's background with the program directory to look for a match.

Building on the experience of other consortia, DM/SEAP developed an efficient and streamlined referral procedure. Accompanying each resume is: a cover sheet, printed on canary yellow paper so that it will stand out in the recipient's mail and receive prompt attention, and a feedback sheet to be sent back to the referring company indicating whether or not the resume matches an existing position. Unless the receiving company follows up with an interview, no further contact with the spouse takes place.

From the spouse's point of view, critics contend, the consor-

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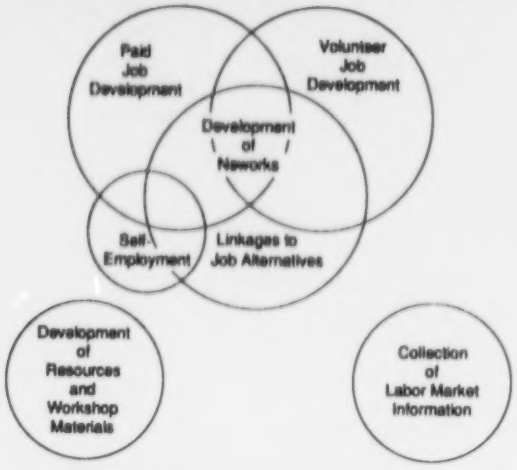
Chart 4

The Job of the Spouse Employment Coordinator



Source: "Spouse Employment Resource Program Guide," U.S. Air Force.

self-employment opportunities, creating an employment resource center, and compiling information on the local job market.

The key to making job referrals and to linking employment information worldwide lies in the automated, stand-alone job bank system developed for the SERP. The bank contains two files: one on clients' skills and preferences, and one on local job vacancies sorted by occupation code. Cross-referencing matches client skills and employer requirements. The job bank system also stores information on the number of spouses who get jobs, the length of their job search, the range of jobs for which spouses are hired, the match of jobs to spouse skills, and the local employers who hire Air Force spouses. This information is for quarterly reports and evaluations of the program's success.

Through the database, Air Force couples can preview job opportunities at several locations prior to a transfer. Spouse information is entered at one location and sent by electronic mail to the location being considered, where the SEC downloads the local job information, cross-references it to the spouse's qualifications, and sends back the profile. The spouse can start setting up interviews in the new location, and, when two or more locations are under consideration, the couple can make an informed decision about the next transfer.

In order for the system to work, the SECs must work together as a team and support each other with accurate information. To insure that they understand the rationale and requirements of the program, all SECs attended an initial week-long orientation and training when the program was launched. Recognizing that programming needs to reflect the local job market, training participants were divided into two groups—those located in the Continental U.S. and those working overseas or in remote U.S. locations. Each group learned how to develop resources and market the program in its own labor market.

The enthusiasm created by the training has carried over into program delivery. Counselors report that the combination of the data base and local counseling provides a structured, yet flexible, system that serves the needs of different personalities and sites. Air Force officials contend that the family programs will remain a high priority because they improve morale, productivity, retention, and readiness.

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tium approach is impersonal. An executive at Mead Corporation, who founded the Dayton consortium in 1979, however, observes that as time passes, the members become more involved in working with spouses on resumes and on interview skills prior to referring them to the network. "Early on, they didn't think it was necessary to spend the time," he reports, "but they eventually started to see that unless they spent the time, the deal was likely to come unglued." Feeling a need to personalize the network, the Dallas consortium has sponsored several "spouse mixers" where job-seeking spouses and company representatives have an opportunity to mingle and meet one another.

Working with spouses to find jobs requires time. Active consortium members estimate that they spend five to ten hours monthly meeting with spouses, attending meetings, and reviewing resumes. While most do not find this burdensome, they point out that they receive no release from their other job responsibilities. They do feel gratified when placements result and spouses are appreciative. But placement is not a certainty. The Dayton consortium estimates that it meets the needs of about 75 percent of referrals, though other networks report far fewer placements. According to a J.C. Penney relocation executive, the consortium is a cost-effective avenue, but only one of many approaches the spouse should use. "All kinds of assistance work together. People changing careers, for example, need to use every avenue."

In addition to providing placements, the employer networks are also a low-cost source of recruits. Of the spouses that Mead has hired through the consortium over the years, 15 are now identified as high potential employees. According to the company, this represents a tremendous saving when the low cost of the consortium is compared to the fees charged by executive search firms.

Organizers of consortia offer three tips for success:

- Monitor procedures to keep them efficient. Require that members target spouses' resumes selectively.
- Strive for a balanced membership that reflects the local job market. In addition to corporate employers, include educational institutions, government agencies, the health industry, and not-for-profit organizations.
- Require member representatives to be committed, responsive and involved. They should have experience in staffing and recruiting, and should understand the job-search process.

The enthusiasm for spouse employment networks appears to come not only from tangible placement results, but also from the professional development opportunities a consorti-

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An Employer Consortium In North Carolina

In 1984, Duke University and the University of North Carolina were having difficulty recruiting their first-choice faculty members because some recruits' spouses were not able to find employment in the Research Triangle area of North Carolina. Concerned that spouse employment issues would threaten their ability to attract top faculty, the two universities organized a consortium of area employers to address spouse employment.

In 1985, the consortium began circulating resumes of relocated spouses among the original 32 members. By 1989 the membership had grown to 39, consisting primarily of local corporations but also including a public school system, several universities, and some medical, governmental and social service organizations.

Explanatory material for members states that the consortium "does not guarantee employment for spouses, nor is it appropriate to request preferential consideration of spouses for positions. Rather, the program is designed to assure that relocating spouses have access to information pertaining to available positions and an opportunity to be considered for positions for which they qualify."

Members initially expected that they would be circulating resumes for female secretaries who accompanied their husbands in a transfer. They found instead that the majority of spouses they were dealing with were professional level people including teachers, scientists, accountants, vice presidents, and production managers. Another surprise was that each year between 23 and 30 percent of the referred spouses were male.

Referral and placement statistics from 1985 through 1989 show that about one-third of the spouses referred to the consortium have found employment and 15 to 20 percent have found employment with consortium members. The time required to find employment ranges from one to twenty months, with the average being a little over five months, depending on whether a career change was involved.

The consortium has several auxiliary benefits for the participating companies and their representatives. The spouse program reduces recruitment cost for participating companies, and membership in the program has been found to enhance the image of the employer in the community. For companies going through layoffs and staff reductions, the group has expanded its services to assist with outplacement, adding outplacement candidates to the resume pool. For the employer representative, the consortium provides a route to professional development, a way to share job market data and network with peers.

Over the years the group has refined standard referral procedures, but expects each member to handle its own feedback to spouses. The group encourages personal contact with spouses and avoids soliciting evaluations by mail.

The consortium demands commitment from its members. The "spouse coordinator" from each member organization is expected to attend quarterly meetings and actively participate in the consortium. If top management supports the need for spouse assistance, then work in the consortium is likely to be a part of the representative's job description. But in some companies, representatives find that consortium responsibility demands overtime.

According to the group's guidelines:

"Employers who participate in the Program agree to:

- send and receive resumes of spouse of recruited and newly relocated employees with the network of Program participants
- assure that prompt and thorough reviews of spouse referrals received will be conducted by appropriate managers in their organizations
- acknowledge and report back to the referring participant regarding each spouse referral received
- appoint a person within each of their organizations to serve as the contact person/program coordinator
- furnish employment information on a regular basis to other participants
- be represented at all quarterly meetings of Program participants."

um affords. One consortium member describes the meetings as "opportunities for interaction and camaraderie. In addition to knowing people beyond your own industry, we use the networking to learn about innovative recruitment and retention strategies."

Individual Support and Counseling

Career counseling is an option that a growing number of companies offer spouses. It normally begins prior to the move and consists of one or more sessions in which a counselor helps the spouse identify career goals, write a resume, and plan self-marketing and interviewing strategies. In addition to developing job search skills, the purpose of the program is to provide emotional support for the job-seeker during the relocation and job transition.

No other form of spouse assistance arouses such strong opinions—pro and con—as the personalized assistance approach, often referred to as "spouse counseling." Companies that have rejected this approach claim it is unnecessary and too expensive. "Only confused people need counseling," says one relocation administrator. In support of personalized assistance, another administrator contends, "There's nothing that takes the place of personal contact. It helps offset the trauma you're asking people to go through, and it's a bargain compared to comparable services like outplacement."

In-house Counseling: Allstate and CIGNA

The content, scope, and cost of individual counseling services depend on whether the referral is to an in-house person

or to an outside service. In the case of in-house services, the service provider may be a staffing or career specialist within the company but is often the same relocation administrator or personnel manager who deals with the employee on other aspects of the move. In-house counseling rarely includes any kind of personalized follow-up during the job search period.

Between one-third and one-half of companies say they have offered informal counseling sessions in conjunction with ad hoc services to spouses. The frequency of this approach, however, seems to have declined somewhat in the last few years, perhaps as a result of more companies formalizing their programs. Because of the informal nature of this assistance, the role of administrators in providing job counseling is usually not explicit. Whether a spouse receives assistance may depend on the administrator's sensitivity and skills, the time available, and, especially, on whether the employee raises the issue of spouse employment.

At Allstate, meeting with the spouse to discuss the job search process is specified as part of the relocation administrator's job. In order to give families more support and reduce the stress of relocation, Allstate revised its guidelines for relocation administrators in 1989, making each administrator the point person for all aspects of the move. Allstate expects relocation administrators to facilitate a job search by meeting with the spouse to offer job-hunting tips and a resume critique. The benefits manager who helped develop the new guidelines explains: "We knew people couldn't just rely on a brochure. They need to go to a person for help. We want the local coordinators to manage the move, to coach people through all aspects."

At CIGNA companies, spouses who want career assistance are referred to the internal career placement department where a consultant will work with each individual to prepare for new employment. To supplement the counseling, the company tries to set up informal job contacts, and also will replace up to one month of a spouse's current salary in order to ease the transition.

In-house counseling was a standard practice at U S West until 1989 when the company replaced the in-house referrals with various printed information. Before the number of relocating spouses became more than internal resources could handle, relocation counselors referred every transferee's spouse to the corporate staffing office for a personal job needs assessment. With growing numbers of job-seeking spouses, the burden on internal counseling resources may prompt more companies to turn to career counseling firms.

Referral to External Counseling Services

The number of companies contracting with outside firms for counseling services has increased gradually over the past five years as more companies establish formal policies on spouse employment assistance and as more consultants develop and market these programs. The services are usually purchased from career counseling organizations, outplacement firms, or third party relocation firms with services targeted especially to the needs of relocating spouses. Prices range from $1,000 to $2,500 per client. The price may be lower if services are offered as workshops for groups of transferees or if the counseling is exclusively via telephone.

A distinguishing feature of this type of assistance is the extensive, counselor-initiated follow-up that continues throughout the job search. Raychem Corporation reports that counselors they use contact their clients at least on a weekly basis. Some programs define a specific period of time for follow-up, typically between two and twelve months from the time relocation is completed. The time limits, however, are interpreted liberally, and some services stay in regular contact with their clients until they find jobs.

An efficient referral process and prompt follow-up are important for the program's success. To prevent an interested party from being unintentionally screened out at the referral stage, Amoco and US Sprint ask the transferee to complete a Spouse Employment Assistance Form, sending a copy to a human resources representative at the new location. At Mobil, the spouse has a personal interview with a trained counselor to establish job needs. In many cases the consultant must contact the spouse and set up an appointment within 24 to 48 hours of receiving the referral. In the interest of speed and efficiency, AEtna makes all its spouse referrals by telephone.

Job Development

Like the career counseling and outplacement models upon which they are based, all spouse programs stress the importance of clients acting on their own behalf. However, an important modification has occurred in spouse counseling in the last few years. A number of service providers have modified their programs to take into account the short time frame and financial requirements of a corporate relocation. The result is that relatively more effort goes into helping the client penetrate the local job market than in traditional career counseling. As one experienced spouse counselor explains, "In traditional career counseling, the task is to empower the client to act, but in the case of relocation, the company is paying you to give real assistance for as rapid and successful a career transition as possible." Motivating and supporting the spouse is still an important part of the service, but many spouse programs are also offering job development, job market research, and networking assistance as an integral part of the package.

Employers place a high value on the job development aspects of counseling services. Describing his criteria for selecting a spouse assistance service, a relocation manager explains: "My sense is that the better spouse employment assistance firms are those that help develop job opportunities. The good ones will pick up the phone, make contacts, get a network going, and set up a lunch." Elaborating on Kodak's spouse assistance over the last three years, a counselor for Kodak notes, "The major difference between spouse counseling and regular career counseling is that relocated people need much more help in networking and meeting people. They're in crisis, and they don't have any contacts in town. They need to be provided with names of selected individuals in their field. We tell them, here are some people who can be helpful to you. Call them and use my name."

US Sprint's Comprehensive Program

Over the past three years, US Sprint has developed a comprehensive relocation career assistance program, one that is likely to expand even further in 1990. US Sprint's first program in 1987 was an in-house counseling service offered through the training and development department, supplemented by literature for a study-at-home approach to self-marketing techniques. The company was satisfied with the quality of the service but, based on feedback from employees that it was difficult to discuss personal situations with an in-house counselor, began to consider using an outside consultant to work with spouses.

In May, 1988, the company added an income replacement feature, on a trial basis, to help dual-earner couples that had trouble qualifying for a mortgage. Mortgage lenders, the company found, would credit the couple's income at 100% of the spouse's previous income if the spouse had guaranteed income replacement for two months. An unexpected side effect of this policy enhancement was that, by enabling couples to buy housing more quickly, the company cut its interim living expenses by 50%.

In early 1989, routine focus groups revealed that "partners," not just "spouses," were at the heart of employee relocation concerns. The company then expanded assistance to include "partners" on an informal basis. When surveys confirmed that management saw this as reasonable, the policy became official.

The visibility and strategic value of the "working partners program" increased when it was integrated with the companywide Family Care initiative announced in August, 1989. A massive task force and policy development process culminated in home mailings to all employees describing the company's integrated approach to managing career and family.

For any working partner or household member, the entire assistance package now includes a personal career consultation, resume preparation, secretarial support and use of office space, access to a national job-lead bank, reimbursement for job search trips, and guaranteed partner income replacement up to $2,000 per month for 60 days. According to the company, the enhanced working partner program is already yielding productivity benefits. Partner assistance has reduced average adjustment time (i.e., low productivity time) by approximately three months.

Looking ahead, the director of relocation foresees new programs to help young children adjust more quickly, relocate teens, and assist college students in finding jobs. This year the company will focus on creating programs for non-working partners to help them reconnect with volunteer and community activities.

From the company's perspective, support for the program can be explained in terms of its emphasis on personal service, internal communication, and productivity. Though group workshops were considered as a more economical way of delivering career counseling, the company ultimately decided that personal attention added value to the program. With each policy addition, the relocation department monitored the reaction of executives and management, always communicating the reason for and results of a pilot program.

The rationale for the entire program is productivity. The company's relocation philosophy is: "If we need your expertise somewhere else, we want to make every effort to get you there with as little disruption to your life as possible. That's the central issue in relocation—productivity. And you get it by focusing on the spouse, partner, and family issues."

Some corporate programs even specify a job development component as part of the counseling process. Amoco describes its program as 12 hours of individualized counseling, part of which is research by the counselor on networking contacts and opportunities in the local job market.

Impact

Another company found it practical to use two different kinds of counselors to provide these two components of the counseling process. A career counselor guides the self-assessment and personal goal-setting, but a special relocation counselor, who has a background in recruitment and the local labor market, works with the spouse on job-finding strategies and tailoring the resume to the local job market.

For employers, the biggest plus of the counseling approach is the personal contact and support—and what it conveys to the transferee and spouse. After weighing alternative options, one relocation manager chose individualized counseling because, "nothing takes the place of personal contact." According to a Kodak relocation executive, "We put stock in our ability to counsel people. If you just handed people a book or money, you would lose that counseling aspect. Research and experience shows that people wouldn't feel as good about it. In relocation it's the emotional aspects that will kill you, and it's the counseling that gets you through."

Many consultants provide periodic reports on the status of each spouse's job search, thus enabling employers to monitor the impact of the program. One company's report, not unique, is that "everybody who has used the service has ended up with a job." Statistics from Ford and Merrill Lynch show that 50 percent or better of referred spouses found jobs in two months or less, compared to the rule of thumb for outplacement allowing one month of job search time for each $10,000 of salary. Moreover, no spouse suffered a career setback; each new job was a lateral move or promotion. Over the three-year span of its spouse counseling program, Kodak finds that 90 percent of referred spouses find jobs, with an average search time of three to four months. AEtna reports similar results.

Corporate executives agree that the biggest problem with offering personalized employment assistance is managing the

Internal and External Counseling at Dow Chemical, U.S.A.

Through a centrally coordinated system emphasizing communication and quality control, Dow Chemical U.S.A. capitalizes on the benefits of both in-house counseling and external consultants. At its Midland, Mich. headquarters, the volume of transfers makes it cost-effective to have a full-time specialist on spouse employment issues. Dow contracts with a national network of career counselors to provide counseling to spouses at its other 40 sites.

In 1987, Dow promulgated guidelines for hiring spouses internally, but those not served by that option were offered additional assistance. An arrangement with a local college provided incoming spouses the same on-campus employment resources and counseling that the college made available to its students. After a six-month pilot program, Dow concluded that the general services were not sufficiently targeted to spouse needs. The company contracted with the college for a full-time counselor to work exclusively with them.

Since 1987, the counselor has served 150 incoming spouses annually. Though technically a college employee located physically outside the Dow facilities, the counselor is familiar with the organization, works directly with its managers, and works full-time on the employment needs of spouses moving into the Midland area. Since the program began, 310 spouses have been served. In addition to working with each person individually, the counselor provides group workshops, video taped interviews for skills practice, and weekly two-hour sessions in which local managers talk about opportunities in the region. The counselor developed a directory profiling 200 area employers, and those who cannot find employment to match their original goals are offered counseling on alternate career paths and techniques for changing careers.

In order to improve communication, in 1989 Dow added one part-time person to its Personnel Service staff to meet personally with every relocated spouse or fiance. The new position coordinates all spouse services. Explains a representative from Dow: "We saw an advantage to centralizing the initial interview with the spouse. We learned that if service delivery was handled by 15 different HR people at the division level, spouses would not get the quality or clarity of service that a central person can offer." To assure quality service at its other locations, Dow relies on detailed, quarterly reports from its contractor. Statistics are the most telling aspects of the reports, but the company also monitors the process a spouse follows from the time of referral to the end of job search. Dow depends on its contractor counselors to take a "holistic approach" and treat the needs of the whole individual. "It's part of our culture to handle things on an individual basis," says a company official.

In 1990, Dow plans to produce a brochure about the program which will be sent to all supervisors and relocating couples. In addition, it will use a videotape to orient supervisors and employees to the program.

Based on their experience with spouse assistance, Dow believes that centralization and sensitivity are the keys to a quality program. Having an internal focal point increases internal support for the program as well as giving it consistency. The company also stresses that the company offers no job guarantees. The spouse still needs to put forth a great deal of effort—not even the best assistance will erase the personal and emotional issues of a two-earner relocation. "Such issues never go away; they can only be minimized."

spouse's expectations. A transferring couple may erroneously assume that employment assistance means job placement. No matter how much networking assistance and follow-up the counselor provides, there are no job guarantees in this type of service. A great deal still depends on the client's initiative and follow through.

Dow Chemical finds that it is important to correct any misconceptions at the outset when the program is first communicated. As an entree to clarifying the nature of the assistance, the Dow counselor asks spouses what they know about the program and what their expectations are. Amoco tries to avoid misunderstanding by putting a detailed description of the service in its relocation handbook for transferring employees. Part of that description reads:

> "While this program cannot guarantee that your spouse will find a job, it is designed to equip spouses with the tools necessary to effectively carry out the job search process in order to secure a new position."

Employers who have experience using external resources for spouse counseling advise companies considering this approach to: (1) make one internal person the focal point and coordinator of the service in order to maintain consistency, accurate communication, and quality control; (2) choose a consultant who is flexible and can adapt the service to the needs of the individual and the company's culture; and (3) stay in contact with the consultant and monitor the service carefully, especially at the beginning.

New Developments

As the idea of spouse employment assistance gains acceptance and companies compile experience with different assistance options, a process of fine tuning and innovation is starting to occur. A number of companies are enhancing and modifying their programs (see box on Ameritech). Some are altering programs to address particular business situations.

Some of the most innovative approaches are in response to four thorny questions:

1. How can companies offer the comprehensive assistance that some spouses need without paying for unnecessary assistance in other cases?
2. How can assistance be offered so that it influences the decision-making process and encourages couples to give positive consideration to a relocation offer?
3. What can be done for expatriate spouses when work permit regulations prohibit their employment?
4. How can relocation trends and changing employee demographics be reconciled?

Flexibility: The Cafeteria Approach

During the last decade, many employers replaced traditional one-size-fits-all benefits with flexible plans. Recognizing the diversity of life-styles some employers are also designing relocation assistance programs that have built-in flexibility.

The kind of help needed is influenced not only by the individual job-seeker, but also by the job market into which the person is moving. Some find a job quickly, while others are destined for a long and difficult career transition. Some need only to be pointed in the right direction, while others benefit from extensive support. The range of individual needs poses a challenge for corporations.

Flexibility already exists in many programs to some degree, via individual counseling, choice between options, policy exceptions, and job search reimbursement policies. One-on-one career counseling assistance lends itself to individualization, but at a price, some companies say, that is excessive for the minimal level of service many spouses need. This is why companies like Johnson & Johnson and U S West offer a choice between different types of assistance, or require the relocation counselor to select the best option for a family.

Another way to adjust to individual needs is with policy exceptions and ad hoc arrangements. Beatrice Corporation, for example, recognizes that a two-earner couple may require more time to complete a move and sometimes stretches the guidelines on temporary living expenses to adjust to the spouse's job search. The director of human resources says that when exceptions are necessary, benefits should be seen as a pie that people divide to suit their individual needs. "We want to give flexibility within a framework. The primary emphasis is to give people enough time to organize two lives. If people need more time, we will try to accommodate them."

Reimbursement for job search costs is another route to flexibility. Square D provides payment of one month's salary up to $2,000. The money can be used for any purpose related to job hunting. Other companies, such as Unisys, Du Pont, and Hewlett Packard, reimburse, within a specified budget, the actual costs of a job search. Reimbursable expenses defined by the company include counseling, resume preparation, job search trips, and local licensing or special training. Although reimbursement allows individuals, in effect, to create their own assistance programs, one drawback is that it does not to provide any guidance in selecting quality or relevant assistance.

IBM and Raychem Corporation

IBM and Raychem Corporation have addressed the issue of individual differences through innovative programs that define available services and maintain quality control, but also allow choice. IBM, one of the first companies to offer a spouse assistance program, enhanced its program in late 1989 to increase the amount and flexibility of services available to relocated spouses. In addition to raising the reimbursable amount, the new program includes an individual counseling option that adapts the amount of assistance to the individual's needs. Spouses may choose one of three options: (1) job search reimbursement up to $1,000, (2) a basic program of individualized career counseling sessions, or (3) a more extended career counseling program. The basic counseling option consists of several hours with a counselor to work on self-assessment and resume preparation. The extended program provides additional hours of counseling and follow-up.

IBM's program manager for relocation and reimbursement plans, observes, "We want a flexible program because each spouse's employment situation is so different. We expect that most people will only need the basic service, but we also want to be able to help the individual who must reevaluate what she can do with her skills."

Raychem Corporation offers a cafeteria approach to individualized counseling. Any spouse who needs job assistance is given a budget to "spend" at a local career center. The spouse may select several kinds of assistance from the following list of options: (1) help in building a network of peers in the area for exploring the job market; (2) preparation of a targeted resume; (3) interviewing practice and role playing for self-marketing; (4) job market research to develop a list of potential employers; (5) self-assessment; or (6) ongoing support, including help with cover letters and coaching during the job search.

Raychem's relocation manager reports that most spouses use up their budget and take advantage of a broad spectrum of serv-

Ameritech: Needs Assessment Helps Design Program

Ameritech has offered spouse assistance on a moderately successful basis since 1983, but a needs assessment survey in 1988 helped the company incorporate spouse assistance in a comprehensive program of family-supportive relocation assistance.

Year	*Event*	*Result*
1983	New company formed following AT&T divestiture; introduced spouse counseling as an innovative program; company reimbursed 50 percent of costs of counseling to $1,500	Low usage; employees complained about sharing cost
1984	Worked with consultant to modify company usage and condense service to be offered at $750	Low usage; company felt it was addressing only part of the issue
1986	Spouse counseling budget raised to $1,500 with no employee contribution	No major complaints; moderate usage
1987	Management emphasized the importance of diverse experience for managers and the role of relocation in career growth	Two-earner couples expressed anxiety about the implications for families; questioned the company's "sensitivity"
1988	Company conducted relocation needs assessment survey of 400 recent and potential management transferees to identify family issues for relocation policy	Recommendation developed for policy enhancements to support families
1989	Recommendations approved by personnel VPs and relocation group of each operating company. Policy additions include: • Terminology changed from "spouse" to "one household member"; • Enriched counseling program; up to $3,000 for expenses associated with job search; • Special care allowance for elderly or disabled dependent; school matching service; • Commuting allowance for up to 12 months if immediate relocation is impossible; • Allowance for children in househunting trip; • More short-term assignments to reduce relocation	Favorable employee response
1990	Workshops on relocation to communication policy and inform employees	Unknown

ices. "We have never done anything that has caused a greater positive response from transferees. The service reinforces to spouses that the company really does have a concern. I've had many people tell me the best thing about this program is having someone to talk to, to keep your spirits up."

Decision-Making Packages

Couples rarely have the opportunity to evaluate job opportunities in the new location before deciding whether to accept or reject a transfer offer. If the company has a spouse assistance program, the couple may not even learn about it or what it offers until after the relocation is under way. A few companies have begun to offer a "pre-decision package" to reduce the anxiety of the unknown and, especially, to reduce employee resistance to relocation. The intent is also to avoid unsuccessful relocations and their attendant costs. Analogous to a house-hunting trip that previews the housing market, these packages allow the couple to preview the job market.

Group Moves

Providing pre-decision information is most common in group moves, in which the relocation process typically extends over 12 to 18 months. The long time line accommodates extensive fact gathering. For example, in moving its corporate headquarters from New York City to Fairfax County, Va., Mobil asked its consultant to provide extensive job market research for the Fairfax area over an 18-month period from 1988 through 1990, when the move will be completed. The spouse assistance firm providing individualized job consultations has also developed an information center. The center contains lists of area industries, social service organizations, educational institutions, and other local employers, as well as annual reports, contact names, lists of professional organizations, and licensing information. Couples are encouraged to visit the center and talk to a career counselor as part of their preview visit to the Fairfax area.

Another group move that offered pre-decision job market research involved Sterling Drug's move from Albany, N.Y., to

Philadelphia, Pa., in 1989. Sterling, building on the spouse program of its parent company, Eastman Kodak, individualized and personalized the fact-finding process by offering two-earner couples a pre-move, decision-making consultation. Any couple that used the service received a two-hour consultation, by phone or in person, to assess the spouse's needs and job interests. The counselor, a paid consultant, then conducted three hours of research on the spouse's behalf in the new job market, and supplied a written report to the couple outlining the general employment picture in terms of the spouse's objectives. The report typically included information on potential employers, salary ranges, and opportunities relevant to the spouse's field, as well as answers to specific questions that may have been raised in the initial counseling session. The Sterling Drug program appears to have succeeded in encouraging couples to accept the group move. The overall employee acceptance rate was 44 percent, but over 65 percent of the employees using the decision-making package accepted the relocation. This suggests that pre-decision information, while not eliminating the need for an eventual job search, may remove the fear factor that inhibits couples from considering a transfer.

Individual Transfers: NCR Pilot Program

For individual transfers, the short decision-making time line, usually four weeks or less, precludes couples from gathering anything but general information. Therefore, providing site-specific information for individual transfers is more difficult. NCR Corporation is one of the first companies to address this problem with a formal program.

As of late 1989, NCR is offering a pilot spouse assistance package that has two phases: (1) a pre-decision consultation and information component, and (2) if the couple decides to take the assignment, a comprehensive employment counseling component. The idea for this two-phased approach grew out of a committee, appointed in the spring of 1989, that was composed of employees who knew the issues firsthand as transferees and as partners in two-earner families. The committee recommended that spouse assistance be offered up front, to everyone, early in the relocation process to help couples make an informed decision.

Prior to notification of a transfer opportunity, an employee is informed of the possible offer and, should spouse employment be an issue in considering the offer, that assistance is available for assessing job opportunities in the new location. The pre-decision service consists of one hour of consultation and needs assessment, three hours of job market research in the new location, and a summary written report for the couple highlighting opportunities and key considerations. To assure that the process is objective, the service is provided by an outside consultant. If the couple accepts the assignment, the same consultant will continue working with the spouse to do further needs assessment, networking and resume preparation.

During the pilot phase of the program NCR is collecting data. In its first months of operation, the program has been well utilized. In fact, some divisions that were not originally a part of the pilot have recognized a business need for the assistance and have asked to be included.

NCR expects the program to have payoffs, not just for relocation, but also for the company's career development system and recruiting. According to the personnel vice president: "We're a worldwide company. Very few of our professionals can have a management career satisfied in a single location. We promote from within. When you lay those facts against the backdrop of the phenomenon of dual careers, you conclude that we need this program to build upon our human resources investment and assure mobility within the company."

International Relocation

International assignments pose a special challenge for two-earner couples because, regardless of whether the spouse can find a suitable job in the host country, work permit legislation and entry visas are often extended only to the relocated employee. An international transfer may mean enforced retirement for the accompanying spouse for the duration of the assignment. This is especially problematic for a career spouse because a lengthy absence from the work force makes career reentry difficult when the overseas assignment ends. The importance of expatriate experience for management development and succession plans is likely to increase as U.S. business expands its operations overseas and absorbs the implications of globalization. In many companies, international assignments already are required experience for key personnel. The incidence of international two-career relocations is likely to grow in frequency as well as importance as more women enter the pipeline for top management positions.

Informal Arrangements

Over the past few years companies have used a number of informal approaches to provide overseas employment for accompanying spouses. In cases where overseas employment is not possible, companies sometimes help identify meaningful volunteer opportunities or help a spouse reenter a career when the foreign assignment is finished. Through networking between human resources and relocation staff, employers have been able on some occasions to identify job openings with other U.S. companies at the receiving location. Some large firms have developed informal, reciprocal agreements with other multinationals to help accommodate relocated spouses, but the highly contingent nature of this approach limits its effectiveness. Some organizations have waived nepotism restrictions and hired spouses internally.

Couples are also working out their own arrangements. A large New York-based financial services firm reports that a growing number of women are asking to work overseas to accompany their husbands on overseas assignments—and the number of men asking for overseas service is growing for the same reason. The firm tries to accommodate these requests, but the individual is paid as a local employee, not as an expatriate. Obviously this kind of arrangement works only if both hus-

Mobil Corporation: A Strategic Approach to Two-Career Relocations

When Mobil found that two-career relocation issues were inhibiting its career development system, it made strategic plans, not only to assist relocated spouses but also to reduce the number of corporate relocations over the long term.

Traditionally Mobil had developed managers by moving them around to give them a broad base of experience. In response to concerns that employees were increasingly unwilling to relocate, the company undertook an internal study in 1987 and 1988 to determine the extent to which relocation concerns affected either career development or retention. The study had three components: a questionnaire administered to a sample of current employees, a post-exit questionnaire sent to former employees, and a spouse questionnaire and telephone interview with 100 employee spouses.

A key finding was that involvement in a dual-career family is the most significant predictor of reluctance to relocate. Moreover, the greater the salary of the spouse, the less willing and able the employee is to relocate. The study also found that anticipation of a requirement to relocate was a factor in employees' decisions to resign, especially among young employees in a two-career couple. The data led the company to conclude that, if projections for the increase of dual earner couples held true, there would be a 50-percent increase in relocation refusal rates over the next 10 years as well as a 20-percent increase in turnover among professional, managerial and sales employees.

Based on its internal study, the human resources planning department made five recommendations:

1. Establish a nationwide spouse employment assistance program to provide individually tailored, high-level outplacement, and counseling services;
2. Provide a commuting option (housing allowance and transportation stipend) as an alternative to relocation for short-term, career development assignments;
3. Improve communication with new hires and current employees regarding the role of relocation in career development;
4. Minimize the need for relocation by using four major hub locations in career development.
5. Strengthen career development counseling with greater emphasis on future development steps.

These recommendations were implemented in 1989. In its first year of operation, the spouse assistance program served 129 spouses in 43 different cities. As part of the emphasis on hub locations, the company relocated its corporate headquarters to Fairfax, Va. Other hub cities are Rochester, N.Y., Princeton N.J. and Dallas, Tex. By concentrating jobs in a few geographical areas, Mobil expects to be able to reduce the number of relocations necessary for future managers.

band and wife are employed by international firms with operations at the same site.

Formal Programs: BP America

One of the first formal programs for international spouses is a new multifaceted package developed for British Petroleum America in Cleveland, Ohio. In 1988, BP America's expatriate population in Cleveland grew dramatically as a result of the company goals for internationalization. Though BP (formerly SOHIO) has had domestic spouse employment counseling in place since the early 1980s, the influx of expatriates left no time for organizing programs for spouses. As a result, the spouses themselves took the initiative, working with the relocation department to provide a range of services that combine individualized counseling with group support and networking.

The foundation of the program, launched in January, 1990, is an initial session with a career consultant, followed by meetings set by the counselor with members of the Cleveland business, academic, and volunteer community who share the spouse's interests. The intent is to help the spouse establish a peer network to stay in touch with personal and professional interests. A schedule of biweekly group meetings, monthly outings, and quarterly luncheons provide opportunities to learn about Cleveland and meet one another.

Since work permit legislation restricts most spouses from working in the U.S., part of the program's focus is to work with a consortium of Cleveland employers to develop opportunities for spouses to pursue professional and personal interests on a non-paid basis. This includes options for academic study, change in visa status, and volunteer opportunities. For those that have unique skills and may qualify for a work visa, the program provides information on the process for changing visa status and helps to identify business organizations that might sponsor the spouse for employment. BP lends the services of its immigration attorney as needed.

A Challenge to Relocation Trends

During the 1980s the number of corporate relocations climbed steadily, despite rising costs, changing transferee demographics and evidence of increased employee reluctance to relocate. For the most part, employers have responded by developing programs to reduce the stress of relocation. Some companies believe, however, that corporations must reevaluate their relocation requirements and reduce the number of transfers.

Mobil is one example of a company that is working to decouple career development from the need for frequent relocation (see box above). Looking toward the future, some human resource planners envision increased use of telecommuting, short-term assignments, and other alternatives to relocation. In the words of Du Pont's manager of corporate relocation, "In the future there will be a continued increase in employee reluctance to relocate and there will be fewer relocations."

Summary and Outlook

Spouse employment assistance programs are becoming more prevalent and formalized. Interviews with relocation professionals and consultants confirm that many companies are in a decision-making phase, evaluating the benefits of moving from informal to formal policy, or enhancing their current offerings. The experience of companies over the last few years suggests some guidelines for companies that want to develop effective spouse employment assistance programs.

Successful programs are built around a needs assessment, a clearly stated business rationale, and ongoing evaluations. Companies that report the greatest confidence in their program develop them in response to a defined need, relate them to clear corporate objectives, and monitor them on a regular basis. Lacking internal needs assessment or evaluation data, most companies cannot document the value of their spouse programs. This detracts from the perceived value of the program, dulls marketing and communications efforts, and effects usage. Setting and monitoring objectives enables an organization not only to measure the program's benefits but also to identify weaknesses and modify the program to support overall relocation and business objectives.

Direct costs should be only one factor in selecting a program. Many spouse assistance programs today are cost-driven rather than strategic. Caught between pressure to "do something" about two-earner transfers on the one hand and contain the ever-rising costs of relocation on the other, many companies use cost as the decision factor for selecting a program approach. Often ignored or underestimated are hidden costs of staff time spent working with spouses and productivity loss in difficult relocations. Since the overall cost of spouse assistance, even for a comprehensive program, is a small part of the total relocation expense, decisions based on cost alone run the risk of trading off program effectiveness for relatively small savings.

To leverage the program's impact, align spouse assistance with other human resource objectives. Innovative programs that have top management support are often those that link spouse assistance to larger human resource objectives in recruiting, retention, management development, and work-family balancing. Defining the implications of spouse assistance too narrowly limits the carry-over and impact of an assistance program. Since relocation is a specialized function within human resources, and the reality and logistical aspects of relocation assistance are outside the mainstream of human resource functions, it is easy for spouse assistance to become segregated from other, related programs. Two-career issues are, however, part of the larger concern for managing a changing work force. Spouse assistance may eventually prove as important for M.B.A. and campus recruiting, for example, as for internal relocations.

Successful programs need an internal champion or coordinator. Companies that report high satisfaction with their programs can usually identify a focal point person who works closely with consultants, monitors results, takes responsibility for identifying problems, and perhaps most important, directs the way the program and its objectives are communicated. Because it is a departure from traditional types of relocation assistance, spouse assistance needs internal marketing in order to achieve its potential benefits.

Use flexible or personalized programs to meet the varied needs of spouses. Many programs implemented in the last year acknowledge diverse employment situations by offering choices in types of assistance offered. One way to make programs more flexible is to offer choices, but knowledgeable advice must be provided in order for spouses to choose the best options. Personal counseling is another way to combine expert guidance and emotional support in a context that allows flexibility.

Help spouses penetrate the local job market. Techniques for helping individuals understand and connect with the local job market are central to a growing number of programs, in contrast to earlier forms of spouse assistance that consisted primarily of self-assessment and resume-writing. Since self-marketing cannot be effective unless it reaches the relevant market, companies are implementing job banks, personalized research, employer consortia, and even job development programs for spouses.

As spouse programs increase in number and quality, it is important to remember that employment assistance is only a partial answer to the challenge of two-career relocations. Spouse programs make relocation viable for couples who otherwise would not consider it. But not even the best assistance can make a transfer acceptable to every two-earner family. Even with excellent employment assistance, two-earner couples may begin to limit the number of relocations they consider. Employment is one issue in a range of family concerns affecting working couples. Relocation packages are likely to devote increased attention to dependent care and other family issues. Companies may also have to consider ways of reducing the need for relocation. Short-term assignments, alternative management development systems, limits on the number of relocations, more stringent criteria for evaluating the necessity of a relocation, and concentrating activities in hub locations are some approaches employers can explore to retain and develop a work force that is increasingly composed of two-earner families.

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